#### NEW SOUTH WALES.

### BUSINESS STATISTICS - FEBRUARY, 1946.

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# PART I PRIMARY AND EXPORT INDUSTRIES.

SEASON. Widespread and substantial rainfall over the greater part of the State during the past two or three weeks followed upon above-average rainfall during January in inland areas. (See rainfall index below). In sheep and wheat districts pastures are either restored or will be so shortly, water supplies are fully replenished, and early cultivation for crops has been made possible. Apart from the central Coastal section, where benefit from recent rains is conditional upon further falls, dairying districts have promise of good late summer and early autumn conditions.

Stock are in good condition in most parts. Demand for sheep for restocking exceeds offerings and for cattle tends to increase following upon rain. Rabbits are increasing in numbers.

# RAINFALL INDEX, NEW SOUTH WALES.

Weighted average ratio of actual to normal rainfall.

Poriod	Dairy	ring D	istric	ts		Sheep	p Dist	ricts		Wheat
	N	C	S	T	N	C	S	W	T	Districts.
1944 1945 1945 - Oct. Nov. Dec. 1946 - Jan.	87 114 94 115 92 92	69 98 80 129 69 44	60 104 77 82 67 67	79 109 89 115 82 77	66 99 42 66 54 153	54 101 68 50 43 100	53 86 125 78 46 166	53 77 116 28 61 236	57 93 85 61 49	53 89 104 67 47 158

WOOL. Purchase of wool by United Kingdom manufacturers is no longer controlled, and according to trade reports British buying in Australia has been appreciable. United States buyers continue to import substantial quantities of Australian wool and there are indications that when normal auctions are resumed, fine types will find a keen market. The U.K. Government has purchased the British 1946 wool clip at prices as in 1945.

Appraisements in Sydney are proceeding steadily; this season to February 13 appraisers had dealt with 590,112 bales (103,109 bales fewer than in the corresponding period of last season). To that date 763,835 bales had been received in Sydney in 1945-46 compared with 780,914 bales in 1944-45.

WHEAT. The latest estimate of Australian production in 1945-46 is 144.3 m.bus. (compared with 52.1 m. bus. in 1944-45). For N.S.W. wheat, f.a.q. for 1945-46 grain has been fixed at 63.5 lbs to the bushel (0.5 lb. higher than for 1944-45 wheat).

To contribute to relief of the world food shortage wheat for stock feeding is to be reduced by 5 m. bus. Australia is to ship 150,000 tons (4.6 m. bus.) to India by the end of March and flour mills and railways are straining to provide and move as much flour and grain for shipment as possible.

There are no restrictions (other than licensing) on the sowing of wheat for 1946-47 harvesting and the Australian production goal is 15.5 m. acres, compared with 11.5 m. acres in 1945-46 and the pre-war average of 13 m. acres. Much work preliminary to sowing has been done in N.S.W. and early indications are for increased acreage.

DATRYING INDUSTRY. After a check in early summer, production in main dairying districts in N.S.W. is stated to be ahead of that of last season, (as it was in the Spring). During December production in N.S.W. factories was 8.8 m. lbs in 1945 and although 1.3 m. lb. more than in 1944 was 4.7 m. lb. below the average for Doc. 1937 to 1939. The 36 m. lb. for the half year (0.9 m. lb. more than in July-Dec., 1944) was only two-thirds of the pre-war average. Cheese production also increased in December and was 0.2 m. lb. greater for the six months than in 1944 but 0.5 m. lb. less than in 1943 (when British demand for cheese was stressed

## BUTTER PRODUCED - N.S.W. FACTORIES.

Period	Average '37-38 to '39-40 m.lbs.	1941-42 m.lbs.		1943-44 m.lbs.	1944-45 m.lbs.	1945-46 m.lbs.
July - June	113.9	85.1	93.8	87.9	71.7	
July - Sept. Oct. Nov. Dec.	17.5 10.1 13.1 13.5	15.1 7.5 7.9 8.6	16.4 7.5 11.3 12.0	11.5 8.5 11.6 13.1	10.9 8.5 8.2 7.5	12.3 7.5 7.4 8.8
July - Dec.	54.2	39.1	47.3	44.8	35.1	36.0

Very high production in Queensland largely offset heavy decreases in Victoria and South Australia to leave Australian production in July-Dec. 1.7 m. lbs less (at 167.1 m. lbs) than in 1944, with the quantity in December 2.7 m. lbs. greater. Loss cheese was made in Dec. than in Nov., but for July-Dec., with increases in Queensland and N.S.W., tho quantity made was 1.9 m. lbs. more than in 1944 and only 0.5 m. lbs. less than in 1943.

#### BUTTER AND CHEESE PRODUCED - AUSTRALIAN FACTORIES.

7		er (millio		Cheese (million lbs.)			
Poriod	1943	1944	1945	1943	1944	1945	
Yoar ended June October November Docember	368.2 38.0 46.9 47.0	337.8 37.7 35.8 34.1	307 • 2 35 • 6 35 • 9 36 • 8	80.6 11.8 12.4 11.1	80.0 11.8 10.9 9.2	77.1 11.7 11.5 10.8	

Distribution of drought relief (£170,000 provided by Commonwealth and N.S.W.) to dairy farmers was effected early this month. This was based upon income to help farmers who, because of loss of production, did not benefit materially by relief in the nature of subsidies.

GENERAL. EGGS. Prices were increased 3d. to 2s. a dozen wholesale from Feb. 2.

MEAT. Wholesale prices of lamb were increased 1d. a lb. to  $9\frac{1}{4}$ d. over 36 lb. and  $9\frac{3}{4}$ d. for light lambs. Retail lamb prices were also increased together with those of veal from Feb. 6.

BARLEY. The final advance on No. 6 (1944-45) Pool of 5d. for 2 row malting,  $2\frac{1}{4}$ d. for 6 row malting and  $5\frac{1}{4}$ d. for feed grades made early this month brings total return to growers to 5s.,  $4s.3\frac{1}{4}$ d., and  $3s.9\frac{1}{4}$ d. less freight, respectively.

RICE shows good development. The maize area exceeds that of last year (94,107 acres for grain) and condition of the crop is mostly favourable. Late and patchy germination destroyed chances of the present grain sorghum crop contributing materially to fodder reserves.

MINING. Loans to assist rehabilitation of the mining industry are being provided by the Commonwealth.

Proposals to add 750,000 acre ft. to storage capacity of the Hume Dam are to be considered by State Governments affected.

TUNGSTEN. The United Kingdom contract to purchase Australian surplus production of tungsten terminated on Feb 15, 1946.

SUGAR. An additional ration of 4 lb. refined sugar per person for jam making became available from Feb. 20.

# PART 11 FINANCE AND TRADE.

GENERAL. Oversea Representation. The Commonwealth has appointed Mr. N.K. Mighell, C.N.G. as Deputy High Commissioner, and the New South Wales Government has appointed Hon. J.M. Tully (Minister for Lands) as its Agent-General in London. Chili has appointed a Minister to Australia, reciprocating the recent appointment of an Australian Minister to that country.

Oversea Trade. Australian industrialists have sent Sir Bertram Stevens to India for trade discussions. Formation of a government sponsored export corporation is being considered by the Commonwealth.

An Imperial Conference in London to discuss Empire trade and defence preceding the Peace Conference in Paris in May is mooted.

U.N.N.R.A. had placed firm orders for goods to the value of £6.8 million in Australia up to January 31st, 1949, including textiles, clothing, etc., £4.4 million and £500d products £0.9 million. Australia's first contribution of £12 million has been made available to U.N.N.R.A.

Zoning of Broad, Milk and Ice. Early repeal of National Security Regulations enforcing zoning has been requested by the New South Wales Government, but it appears unlikely that effective ending of zoning will be accomplished for some time.

Gensus. The Commonwealth Government has decided that a general census is to be taken on (or about) June 30th, 1947.

North Coast Deep Sca Port. A special State committee has recommended establishment of a deep sea port at Iluka, near the northern entrance to the Clarence River, and construction of a railway to Inverell to serve north western New South Wales.

COMMONWEALTH ACCOUNTS. Commonwealth revenue remains buoyant and as yet expenditure shows no tendency to decline from the wartime high level. Income tax produced £12.4 million more in July-January, 1945-46 than in the seven months of 1944-45; customs and excise yielded £3.0 million more other taxes, £2.1 million more. Against the total increase in revenue of £17.2 million there was an increase in expenditure (from loan for war and from revenue) of £14.1 million with increases for social service payments of £7.4 million and for war (1939-45) of £4.1 million as the major elements. Heavy outgoings on account of leave and deferred pay to discharged service men and women contributed to the high rate of war expenditure. Ordinary non-war expenditure was £1.1 million greater for the seven months.

Accounts for January showed increases in revenue of £4.8 million and in expenditure of £5.3 million in comparison with January, 1945 with movements by items more or less in conformity with those for the seven months.

	Month of	January	Sozon m	onths end	100
Particulars.		o and a	DOVEL LI	January	IGU
	1945	1946	1945	1946	Change
DESIGNATE CONTRACTOR OF THE PROPERTY OF THE PR	£n.	£m.	£m.	£m.	£n.
REVENUE. Customs and Excise	5.5.	6.8	39.5	42.5	(+) 3.0
Income Tax	12.9	14.2 6	89.7	102.1 0	(+)12.4
Other Taxes	4.7	6.7	30.3	32.4	(+) 2.1
Business Undertakings	2.5	2.6	17.6	17.3	(-) 0.3
Other	.2	.3	4.2	1 4.2	1
Total, All sources	25.8	30.6	181.3	198.5	(+)17.2
EXPENDITURE. War (1939-45) from-	and the state of t	ligne in species all till deligener deler i denni i denni apperinser. L	a property of the	pergendi ener Musery-	A made of it in
Revenue	13.4	17.1	102.9	115.1	(+)12.2
Loan	23.4	23.2	167.1	159.0	(-) 8.1
Total War	36.8	40.3	270.0	274.1	1(+) 4.1
Social Services	3.2	5.2 x	2	30.0 x	1 " "
Paymonts to States	1.3	1.3	8.5	9.3	(+) 0.8
Income tax re-imbursed to States	2.2	2.2	9.7	10.4	(+) 0.7
Other	5.8	5.6	37.6	38.7	(+) 1.1
Total Expenditure	49.3	54.6	348.4	362.5	(+)14.1

of Includes social services contribution.

x Includes £0.9 million in January and £5.0 million in July-January met from balance at credit of National Welfare Fund at 30th June, 1945.

NOTE: This table is not directly comparable with tables given in earlier notes because it brings to account items previously excluded (e.g., income tax reinbursements to the States and expenditure from balance in National Welfare Fund at 30.6.45.)

As indicated in B.S. 1946/1B, p.3, the Commonwealth is to continue as sole collector of income tax, making reinbursement to the States according to a formula agreed upon at the recent Premiers' Conference.

TRADING BANKS. Figures for nine trading banks covering business in Australia disclose significant movements toward greater freedom in lending activities and more active employment of customers' funds. These tendencies may be observed in the movements June to December of 1944 and 1945:

July-	Depo	sits.	Cash and	Govt. and	Special	Advances,
December	Fixed.	Current.	Treasury		Wartime	Discounts,
			Bills.	Alia contra-donner - dell'atringpoleni (con		
		Movemen	t over Six	months period	. £ milli	on.
1944	+4.3	+32.3	+13.4	+20.1	+14.6	-15.8
1945	-1.3	+25.1	+26.1	+11.4	-11.8	+ 1.0

Noteworthy are reversals in trend of fixed deposits, advances of and special wartime deposits, and the strengthened cash position of the banks.

During December, 1945 deposits increased by £14.9 million and cash, etc. and Treasury bills by £9.2 million. Seasonal influences were behind a reduction in advances of £1.2 million (compared with that of £6 million in December, 1944). Special deposits with the Commonwealth Bank rose by £2.7 million compared with the increase of £6.4 million in December, 1944.

NINE TRADING BANKS - AUSTRALIA Liabilities and Assets within Australia. 2 million.

	I I	Deposits	makes the territory developed					
1.	Bearing Interest (Fixed)	Not Bearing Interest (Current)	Total	Coin, Notes, etc. & Cash at C'wealth Bank	Treas- ury Bills		Special Wartime Deposits with C'wealth Bank	Advances Dis- counts etc.
1939-June 1942- " 1943- " 1944- " 1945- " 1944-Oct. Nov. Dec. 1945-Oct. Nov.	200.9 192.0 197.4 219.9 224.0 222.1 223.9 224.2 222.7 222.7	117.1 195.9 256.1 314.6 358.5 329.6 331.5 346.9 362.5	318.0 387.9 453.5 534.5 582.5 551.7 555.4 571.1 585.2 591.4 606.3	33.4 38.0 36.5 38.4 36.9 41.3 40.1	23.9 39.6 50.8 55.4 46.5 62.4 62.0 65.5 60.3	22.1 56.3 75.7 89.1 104.3 101.4 104.8 109.2 110.4 113.0 115.7	36.4 102.9 182.8 241.8 185.3 191.0 197.4 224.6 227.3 230.0	291.7 268.3 246.0 221.8 207.9 216.2 212.0 206.0 209.1 210.1 208.9

SAVINGS BANKS. Depositors' balances in savings banks have been increasing rapidly in recent months. In Australia the increases in December and the six months ended December, 1945 were £10.9 million and £55.7 million respectively compared with £6.2 million and £45.2 million in corresponding periods of 1944. Of the respective increases £4.8 million and £21.4 million occurred in New South Wales in 1945 compared with £2.4 million and £16.3 million, in 1944. The payment of leave and deferred pay to discharged personnel and the higher rate of social service payments are factors in the accelerated rate of accumulation.

#### SAVINGS BANK DEPOSITS : N.S.W. AND AUSTRALIA.

AND REPORTED A STATE OF THE STA	N.S.W.	kryydr gydystytti (th.) 4 datr dillar itaan ethio daan gyborbory ethiosiaaniar dar . gy	AUST	RALIA
Period.	Deposits at end of period.	Increase or Decrease(-) in period	Deposits at end of period	Increase or Decrease (-) in period.
Year ended June: 1939 1942 1943 1944 1945 ionth: 1944-Oct. Nov.	£000 87,474 94,538 132,405 162,867 198,203 173,981 176,748	£000 1,458 6,788 27,867 40,462 35,336 944 2,767	£000 245,587 274,275 357,995 471,530 566,906 503,049 510,463	£000 5,155 22,044 83,720 113,535 95,476 3,028 7,414
Dec. 1945-Oct. Nov.	179,128 209,905 214,806 219.560	2,380 2,385 4,901 4.754	516,685 599,651 611,689 622,583	6,222 6,681 12,038 10.894

WAR SAVINGS CERTIFICATES. Up to 31st December, 1945 subscriptions for war savings certificates were £19.8 million in New South Wales and £34.5 million elsewhere in Australia. Since hostilities ended new purchases have contracted and redemptions have been heavier; in the last six months of 1945 net sales were £0.59 million in New South Wales and £1.18 million in other States, compared with £1.82 million and £3.16 million, respectively in July-December, 1943.

It is probable that war savings certificates will be replaced by savings certificates within a few weeks (See B.S. 1945/12A, p.4).

	NET SAL	ES OF W	VAR SAVI	IGS CERT	TIFICAT	ES - N.S	S.W. ANI	AUSTRA	ALJA.	
and report and transport depotential transports (core approximation)	194	. 4.		1945		July		or success arrang assess displayed by the play to all		Total
	Nov.	Dec.	Oct.	Nov.	Dec.	1942	1943	1944	1945	to
										Dec., 1945
N.S.W. £000	326	197	41	84	138	1,773	1,820	1,500	591	19,764
Aust. £000	882	586	106	203	330	5,102	4,976	4,207	1,767	54,301

BANK CLEARINGS. The amount of inter-bank clearings (excluding Treasury bill transactions) in Sydney decreased seasonally in January, 1946 but was a record for the first month of the year. The index number (which is adjusted to exclude effects of special governmental transactions) for November-January, 1945-46 was 54% above the 1926-30 average (40% above November-January, 1939-40) and a little higher than for January-November, 1944-45.

The large wartime increase in spending power, processes of rehabilitation, including prospective expansion of the building industry, and the brighter seasonal outlook are factors of strength in the outlook for business generally.

			INTER	R-BANK CI	EARINGS	SYDNEY		nancazati dada elgina derenggati se vegapas	Chara graph capagraphica year accordigitation.	
Period	Amou	nt of Cle	earings (	(£m.) (a)			Inde	ex (b)	on- was good non- pit. I participate waters	or glasses between strategic degrees strategic arts of descrip-
	1939-40	1942-43	1943-44	1944-45	1945-46	1939-40	1942-43	11943-44	1944-45	1945-46
July- Dec. Oct. Nov. Dec. Jan.	476.8 78.0 86.1 91.7 82.6	645.9 115.0 105.0 121.7 106.7	115.5 129.3 127.3	123.7 126.3 127.6	765.9 140.4 129.7 121.6 120.1	102 100 102 106 110	135 138 135 136 136	152 152 149 150	157 159 153 152 152	162 166 164 158

(a) Exclusive of Treasury Bill transactions.

(b) Three months moving average: Base (100) is average of corresponding periods of 1926-30.

STOCK EXCHANGE. Strength has been the characteristic of the share market in Sydnoy, with current prices of most shares, at or near permissible maximum prices. The index of value of 75 representative company shares for January, 1946 was 112.8 per cent. above par value. During the month the retail shares group gained 1.8 points, reaching a new record level, and there were recessions in public utilities (0.2 points) and pastoral and finance company shares (1.7 points).

The index number for the 75 companies stands 22 per cent. above the pre-war level (August, 1939).

## INDEX OF SHARE PRICES - SYDNEY.

Prices of Ordinary Shares (excl. Bank). Par value = 100.

Marie and representative from the state of t			DY WODONO G	ove. States	stician).		Lagger consistences quiet contraction destructions destruction, substitution, event science
	Manufact-			Pastoral		Total	34
Average	uring and	Retail	Public	and	Insur-	75	Active
for Month	Distributing		Utilities	Finance	ance	Companies	Shares
937-Mar.	213.8	203.8	181.0	169.2	281.2	190.4	200.5
939-Aug.	212.6	168.2	156.0	118.2	263.9	174.4	181.9
941-Sept.	227.7	177.2	141.5	127.9	253.2	174.9	181.3
942-Mar.	173.0	138.3	120.8	110.3	213.7	140.6	147.0
1945-Jan.	240.6	203.5	162.7	146.3	264.1	192.8	207.3
Nov.	266.3	224.1	182.1	156.9	291.5	212.8	229.7
Dec.	266.0	224.0	182.3	154.7	291.5	212.6	229.3
1946-Jan.	266.0	225.8	182.1	153.0	291.5	212.8	229.0

REAL ESTATE. Although much potential demand is rendered inactive because of: the operation of Treasury control over transactions, the value of transfers in recent months has been comparable with the pre-war level. Transfers registered in July-January, 1945-46 (£18.46 million) were £5.4 million and £8 million greater in value than in the corresponding months of 1944-45 and 1943-44, respectively. The value of mortgages registered in the seven months (£6.94 million), though £3.61 million greater than in 1943-44 still remained £5.52 million less than in 1939-40. Transactions recorded in January, 1946 were in conformity with the general trend.

#### REAL ESTATE TRANSACTIONS N.S.W.

Poriod	Transfer	s Register	ed (£000)	)	Mortgage	s (Incl.	renewals)	(2000)
	1939-40	1943-44		1945-46	1939-40	1943-44	1944-45	1945-46
July-Sept.	8,921	4,713	6,005	7,648	6,221	1,281	1,863	2,767
Oct. Nov. Dec. Jan.	2,331 2,381 2,067 1,884	1,549 1,558 1,592 1,090	1,654 1,899 1,708 1,786	3,260 3,106 2,195 2,246	1,713 1,703 1,344 1,480	618 -558 494 -383	634 529 699 608	1,128 1,072 899 1,078
July-Jan.	17,584	10,502	13,052	18,455	12,461	3,334	4,333	6,944

### PART III INDUSTRIES, TRANSPORT, ETC.

40 Hour Week. To permit interested parties to intervene and so that the Court may decide whether the application should involve general consideration of the question the Full Arbitration Court adjourned hearing of an application for a 40 hour week by the Printing Industry Employees Union.

SHIPBUILDING costs in Australia have proved much higher than in other countries. The shipbuilding yard at Port Kembla, established during the war by the State Government is to continue activities as a private enterprise.

AIRWAYS. At its first meeting on Feb 13 the National Airlines Commission, indicated its view that the Commissions airlines (to be established) should operate as a commercial undertaking and not as a Government Department.

HOUSING. The N.S.W. Government has decided to rg-acquire the Homebush Bay Brickyards, which, prior to 1936, were a State undertaking. Work has begun at Villawood on a programmo of 1,352 omergency type, pre-fabricated houses a year by the

MANUFACTURING INDUSTRIES, N.S.W.

Manufacturing continued at a high level during 1944-45, but owing to curtailment of the munitions programme in the latter half of 1944, figures of employment, the wages bill and production were slightly below those of the record year 1943-44. The number of factories, however, was 604 greater than in that year. Comparative details, given below, show the wartime expansion of factory activity, expressed proportionately in the last line of the table. Between June, 1944 and 1945 male employees decreased by 3,025 and female employees by 4,675.

#### FACTORIES IN NEW SOUTH WALES.

Year	and direction of the binder	Land, Bldg	s,Plant.	Employ	ees (inc	luding	Sal-	Gross	Net
ended Oth June	Fact-	Addns.	Value	Working	Propriet	ors) Ø	aries & wages	Value	Value of
om ourse	ories	and Renewals.	at June	Males	Females	Total	1 . 7		duction.
	No.	£m.	£m.				£m.	£m.	£m.
1939	9,464	11.5	120.0	169,513	62,287	231,800	44.6	218.4	90.3
1942	10,166	11,8	135.6	220,013	82,107	302,120	75.8	339-5	138.8
1943	10,110	15.6	145.7	225,855	92,462	318,317	88.9	373.5	153.6
1944	10,755	16.1	152.8	228,845	97,311	326,156	93.5	399.1	162.7
1945	11,359	9.4	154.1	225,472	91,715	317.187	89.2	387.7	159.9
ncrease % 939 to 1945	20	(-) 18	28	33	47	37	100	78	77

Average number during year X Value of output less that of materials and fuel used.

There was a significant contraction in the number and activities of Government factories, but it is apparent that private factories succeeded in largely offsetting the curtailment of munitions production by other types of manufacture.

Yoar Inded oth June	No. of	factories	Employees		Salaries pai	and wages d	Net value of Production.	
	Govt.	Private	Govt.	Private	Govt.	Privato	Govt.	Private
1939 1942 1943 1944 1945	72 118 141 146 135	9,392 10,048 9,969 10,609 11,224	000 16.2 28.4 38.2 40.7 34.0	000 215.6 273.7 280.1 285.5 283.2	£m. 4.1 9.3 13.3 14.0 11.8	£m. 40.5 66.5 75.6 79.5 77.4	£m. 5.6 12.1 16.7 17.3	£m. 84.7 126.7 136.9 145.4 145.0

As might be expected "Metal Manufactures, Machines, Implements and Conveyances" - predominant group in N.S.W. manufacturing industries - showed reduced employment and production in comparison with 1943-44 but practically all other major groups gained employees and expanded production. Textiles (not clothing) was notable exception; there was great difficulty in maintaining the labour force in this industry. A comparison with pre-war figures reveals effects of wartime restrictions on paper, stationery and printing, building materials, furnishings, etc. and on miscellaneous manufactures.

# EMPLOYMENT AND PRODUCTION IN MAJOR FACTORY GROUPS, N.S.W.

	Average n	Net value of factory production				
Groups of factories producing	1938-39	1943-44	1944-45	1938-39	1943-44	1944-45
etals, machines, implements, and			peringradi digengken distinggan gigte dijer pore gan go	£000	£000	£000
conveyances  cod, drink and tobacco  hemicals, dyes, paints, oils, soa aper, stationery, printing, etc  leat, light and power  lothing  extiles (not clothing) ailding materials, furnishings, etc	17,405 3,179 32,414 15,175	164,241 34,361 11,836 15,102 3,707 32,671 20,453	151,672 34,838 12,252 15,846 3,797 35,277 19,443	31,691 16,106 6,393 6,538 5,489 6,227 3,553	78,525 21,260 9,658 8,058 7,188 10,047 8,102	72,659 22,662 10,327 8,620 7,313 11,001 7,826
(classes II,X and XI) ther products	25,103 17,853	22,807 20,978	23,510 20,552	8,120 6,149	9,892 9,816	10,169 9,298
TOTAL	231,800	326,156	317,187	90,266	162,546	159,875

Ø Includes working proprietors.

There was a steep wartime rise in average earnings of factory workers, and although the average in 1944-45 was a little lower at £289 11s. than in 1943-44, it was £90 1s. (or 45.6%) higher than in 1938-39, with the average of males 44.3% and that of females 64.2% greater.

#### AVERAGE SALARIES AND WAGES PER FACTORY EMPLOYEE O

	1938-39	1941-42	1942-43	1943-44	1944-45
Males Fomale	23 <sup>5</sup> .8 102.5	£ 30 <b>5.</b> 2 133.8	£ 341•3 156•2	348.9 170.1	£ 340.3 168.3
Person	199.0	257.7	286.5	294.5	289.6

Based on the average time worked during the year; working proprietors excluded.

RAILWAYS. Train mileage was severely curtailed in December and January owing to the shortage of coal, but many passenger services have been restored and the railways are moving foodstuffs (including the heavy wheat harvest) to the seaboard as rapidly as possible to contribute to relief of the world food shortage. A stoppage of work by shunters is at present prejudicing these efforts. The quantity of goods and livestock transported in December, 1945 was little more than one-half that moved in December, 1942 or 1943 but the number of passenger journeys remained at a record level, despite many fewer trains.

In July-Dec. passenger journeys in 1945 were 6.9 million (5.6%) more than in 1944 but goods tonnage was 1.6 million tons (16.6%) less. Net earnings for the half year (£3.64 m.) - before meeting interest, etc. charges - were below those of the last few years, due partly to the fall in gross earnings (of £0.44 m. compared with July - Dec. 1944) and partly to increasing working expenses; these absorbed 76.6% of gross earnings, compared with 75.2% in 1944 and 72.9% in 1942.

#### NEW SOUTH WALES - GOVERNMENT RAILWAYS.

Financial	Month	of December	C	Six months ended December					
Year	Passenger journeys	Goods and Livestock	Gross earnings	Passenger journeys	Goods and Livestock	Gross earnings	Not earnings		
1938-39 1942-43 1943-44 1944-45 1945-46	Millions 15.9 19.9 20.5 20.7 21.5	000 tons 1,510 1,587 1,552 1,480 843	£000 1,828 2,851 2,845 2,664 2,256	millions 95.4 116.2 123.1 123.8 130.7	000 tons 7,362 10,038 10,073 9,617 8,021	£000 9,653 17,278 17,722 16,000 15,558	£000 2,574 4,682 4,447 3,975 3,639		

Ø Gross earnings less working expenses - available to pay interest, etc. on railway loan debt.

MOTOR VEHICLES. As from this month the petrol ration of private motor users was increased by approximately 50 per cent., giving a monthly mileage of about 180 miles. The control over tyre-retreading has been lifted, but the industry is not likely to be able to meet all demands immediately. Post-war models are beginning to arrive in Australia in limited numbers from oversea manufacturers.

In December, 1945 the number of new vehicles registered averaged only 5 cars and 38 lorries and vans a week - less than one-tenth the number in December, 1939, and below the average number in any wartime year excepting only 1942.

Total registrations increased by 3,420 in December, 1945, including 1,100 cars and 1,257 lorries and vans. In the half year ended last December 11,685 vehicles went on the register, compared with 7,608 in July-Dec., 1944. Of these, 5,713 were lorries and vans, bringing the total of such vehicles over 11,000 above the pre-war number. At 31st Dec., however, there were 28,221 fower cars on the register than in August, 1939.

#### MOTOR VEHICLES REGISTERED IN N.S.W.

	New registrations			All registered motor vehicles.							
Type of vehicle				No. at end of -					Increase July-Dec.		
	Dec. 1939	Dec. 1944		Aug. 1939	July 1942 x	Doc. 1944	Dec. 1945	1939	1944	1945	
Cars Lorries and Vans Total vehicles Ø	Av. n 344 127 471	o. per 9 58 67	5	000 216.6 77.6 329.2			88.7	393 948 926	3,426 2,472 7,608	2,961 5,713 11,685	

Total cars, lorries, and vans only for new registrations x Lowest war-time number of cars.